SiteManager Training Manual

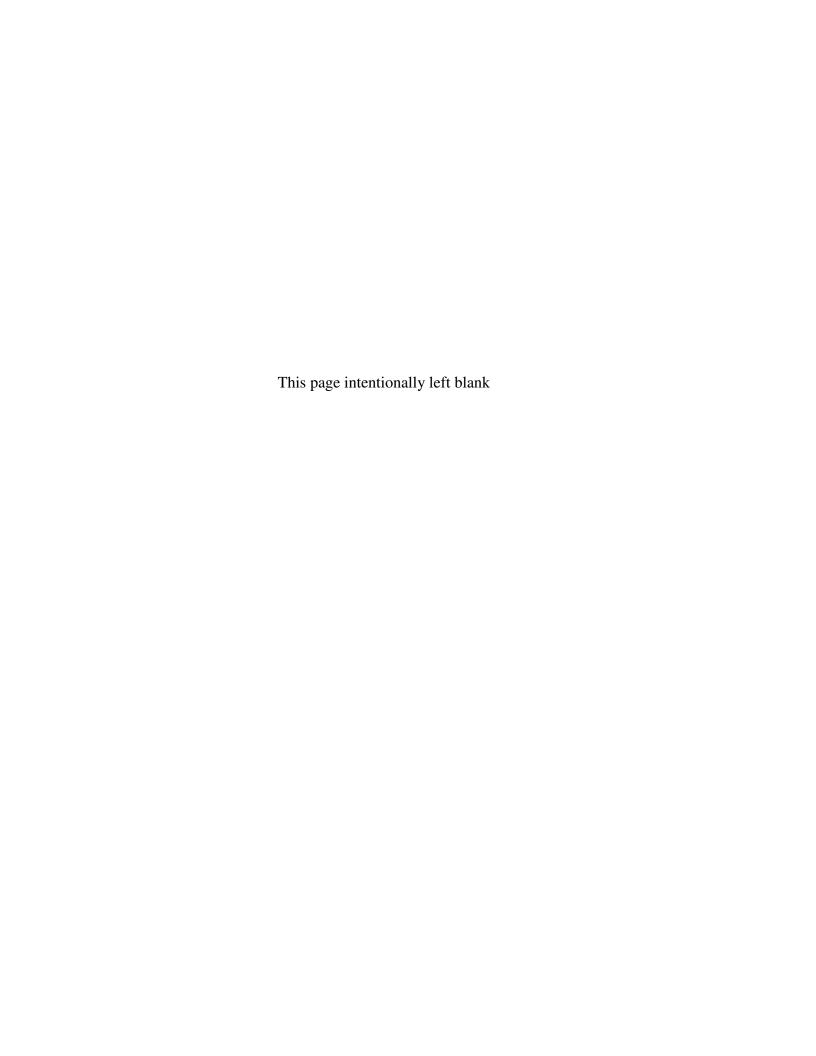


Module B Chapter 1

Daily Work Reports (+)
Daily Work Reports

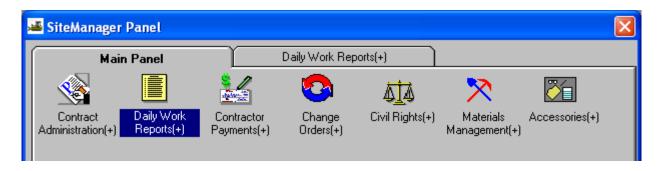
Section B-1-1

Creating a Daily Work Report

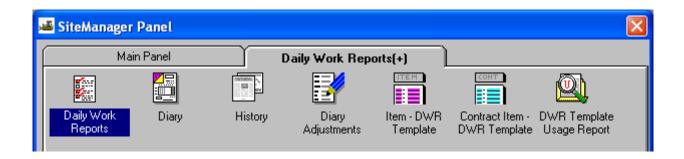


Creating a Daily Work Report

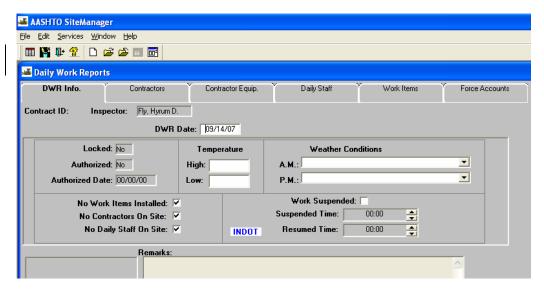
This section will explain how to create a Daily Work Report (DWR).



"Double-click" on Daily Work Report (+) icon, located on the Main Panel



"Double-click" on Daily Work Reports icon.



The Daily Work Report window will open.

There are six tabs where contract information will be captured:

- **DWR Info**: Daily Work Report documents information pertaining to weather and controlling operation
- Contractors: Contractors daily attendance record referring to Contractor's workforce such as:

Supervisor(s),

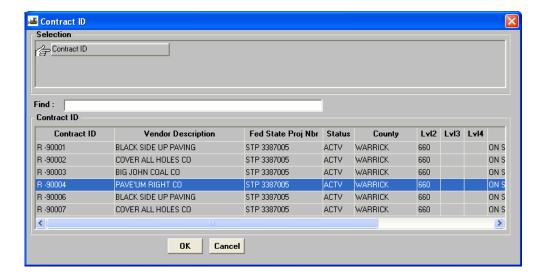
Worker(s) by personnel type

- Contractors Equip: Contractors Equipment tab documents the presence and use of equipment on the job site by selected Contractor(s).
- Daily Staff: Daily Staff tab will not be used by INDOT.
- Work Items: Work Items tab is used to document installed work items by selected contractor by project.
- Force Accounts: Force Accounts tab will not be used by INDOT

If a contract is already open then "click" on the **New** D button on the toolbar.

[&]quot;Click" on Services located above the toolbar.

[&]quot;Click" on **Choose Keys** from the dropdown list.



The Select Contract window opens.

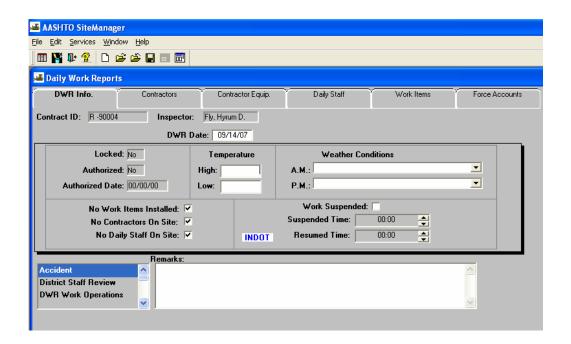
The Bottom Panel contains the following columns:

- **Contract ID:** is the identification number assigned to the contract.
- **Vendor ID:** is the INDOT assigned identification number for the Prime Contractor.
- Fed State Proj Nbr: is the unique identifier for the project.
- **Status**: column indicates current status of the project, Active, Pending, Complete, or Archived.
- **County**: column shows the county where the majority of the work is located.
- Lvl 2: The Lvl 2 column indicates the District Office administering the contract.
- Lvl 3: The Lvl 3 column is not utilized by INDOT.
- Lvl 4: The Lvl 4 column is not utilized by INDOT.
- Location Description 1: the Location Description 1 column is the description of the actual work location.

If a contract has previously been selected "click" on the **open** folder located on the toolbar and select the appropriate contract.

[&]quot;Double-click" on the appropriate Contract ID.

DWR Info tab



The top section contains the following information:

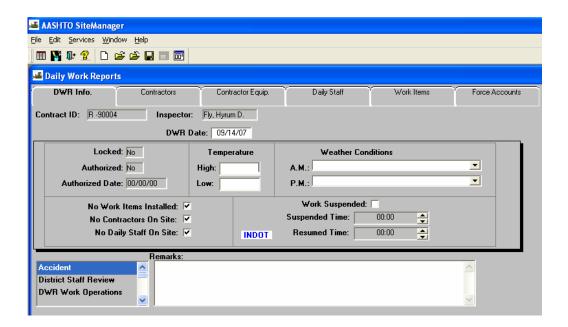
Contract ID: the **Contract ID** is the identification number assigned to the contract.

Inspector: the **Inspector** field contains the name of the individual that is creating or has created the Daily Work Report. This field is populated automatically.

DWR Date: the **DWR Date** is the date the DWR information was entered. The current date will automatically populate in the date field. To change the date, "double-click" in the **DWR Date** field.

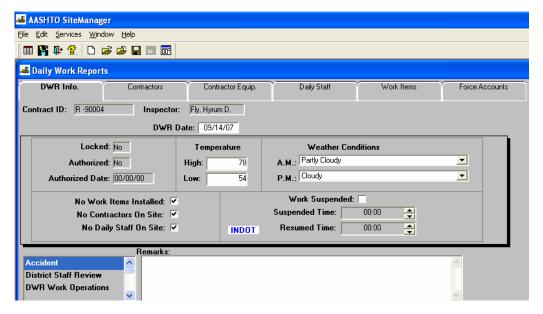


"Click" on the appropriate date and "Click" OK.



The middle panel contains the following information:

- **Locked:** the **Locked** field notifies the viewer that the DWR may be edited when populated with **No** or can not be edited but only viewed, when populated with a **Yes**. This field automatically populates.
- **Authorized:** the **Authorized** field notifies the viewer that the DWR has been reviewed and approved. This field automatically populates.
- **Authorized Date:** the **Authorized Date** field contains the date the DWR was approved. This field automatically populates.



Temperature field is used to record the **High** and **Low** temperatures of the work day.

"Click" in the **High** temperature field. "Enter" the **High** temperature for the day. Temperature may be adjusted with up/down arrows.

"Click" in the **Low** temperature field. "Enter" the **Low** temperature for the day. Temperature may be adjusted with up/down arrows.

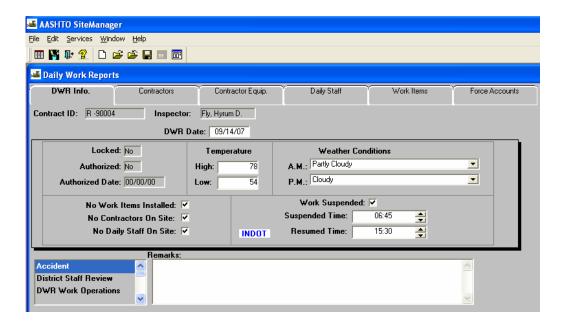
Weather Conditions field is used to record weather conditions of the work day both in the A.M. and P.M.

Weather Condition:

- Clear
- Cloudy
- Other
- Partly Cloudy
- Rain
- Snow
- Tornado
- High Winds
- Fog

"Click" the dropdown arrow in the **A.M**. field and "select" the appropriate weather condition.

"Click" the dropdown arrow in the **P.M**. field and "select" the appropriate weather condition.



Note: the bottom left section of the panel contains:

No work Items Installed,

No Contractors On Site,

No Daily Staff On Site

Check boxes are pre-populated with a check mark until information is entered on the appropriate tabs.

Once the information is entered and saved the check mark is no longer populated.

Work Suspended field is used to record time when the contract work is suspended. Time is based on a 24 hour clock (Military time).

NOTE: Only the PE/S populates the work suspended information.

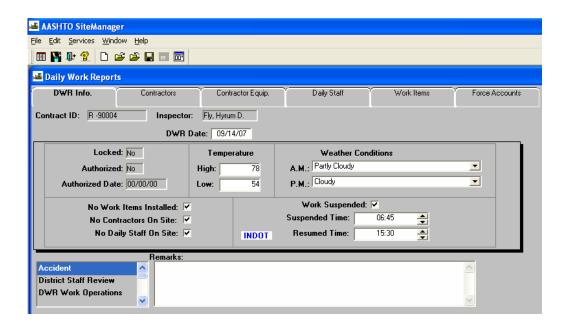
[&]quot;Click" in the **Work Suspended** check box, if appropriate.

[&]quot;Click" in the **Suspended Time** field.

[&]quot;Enter" the appropriate time the work was suspended.

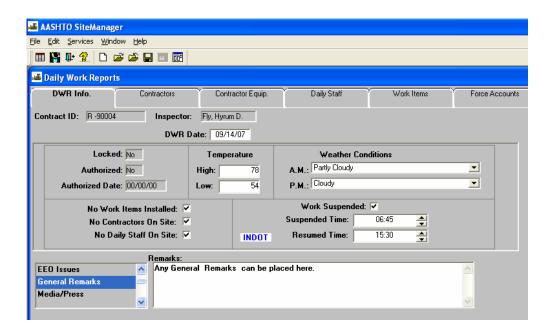
[&]quot;Click" in the **Resumed Time** field.

[&]quot;Enter" the appropriate time the work was resumed.



During the life of the contract additional information will need to be recorded. The following are **Remarks** category options:

- Accident
- District Staff Review
- DWR Work Operations
- EEO Issues
- General Remarks
- Media/Press
- Other
- Personnel Remarks
- PE/S Controlling Operation
- PE/S Fractional Day Workable
- Safety Violations
- Staff Remarks
- Supervisor Remarks
- Traffic
- Visitor
- Work Suspended



[&]quot;Click" the **Remarks** type from the scroll list to the left of the Remarks field.

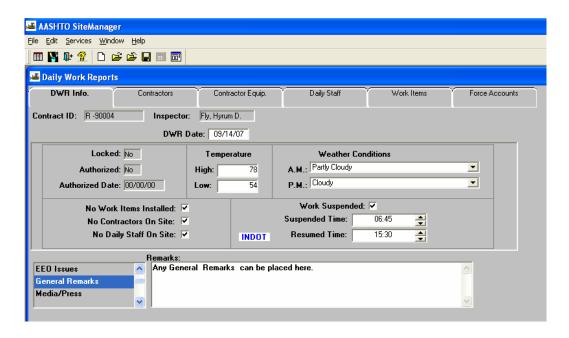
NOTE: the **PE/S Controlling Operation** and **PE/S Fractional Day Workable** remarks will be recorded by **PE/S** only.

"Click" the **Save** licon located on the toolbar.

[&]quot;Enter" appropriate information in the Remarks field.

Contractors tab

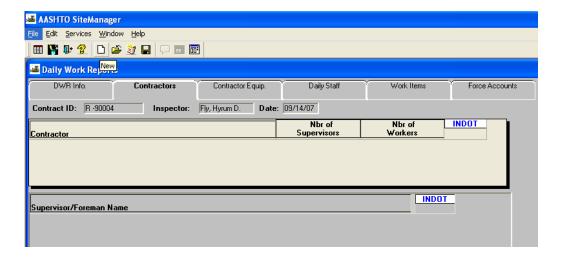
The contractor's personnel information will be recorded in the **Contractors** tab. At a minimum a **Contractor** must be selected to allow **Work Items** to be recorded.



The Contractors tab contains three panels for collecting information:

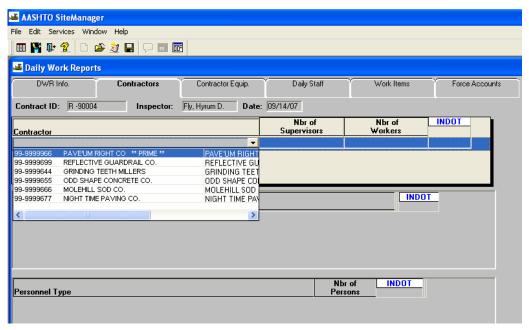
- **Contractor:** contains information pertaining to the identities of the contractors operating on site the date of the DWR
- **Supervisor:** contains information pertaining to the contractor's supervisors on site the date of the DWR.
- **Personnel Type:** contains information pertaining to the numbers and classification of non-supervisory personnel working for the contractor on the DWR date.

"Click" on Contractors tab located in the top panel.



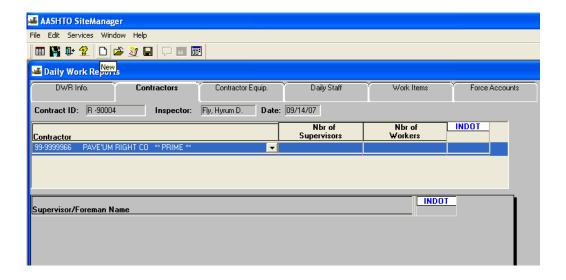
"Click" on Contractor panel.

"Click" the **New** D button located on the tool bar.



"Click" on the drop down arrow.

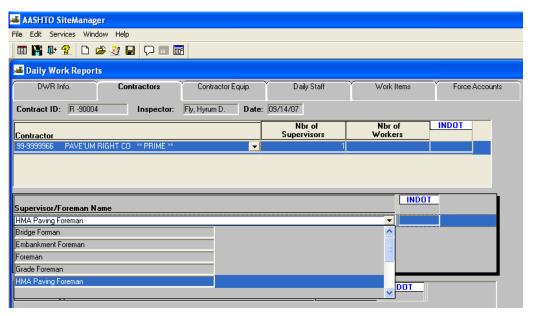
"Select" the appropriate Contractor from drop down list.



Individual **Supervisor/Foreman's Name** or title must be selected.

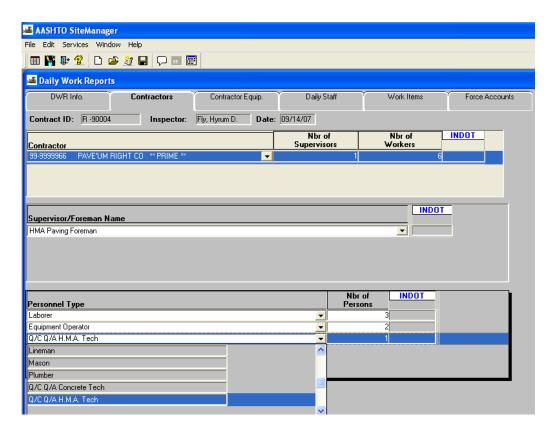
"Click" on **Supervisor/Foreman Name** panel located in the middle panel.

"Click" the **New** D button located on the tool bar.



"Click" on the **Supervisor/Foreman Name** drop down list and select the appropriate Supervisor/Foreman title.

Repeat this step until all of the Contractor's **Supervisor/Foremen** have been selected.



It is necessary to record the **Personnel Type**, **Number of Persons** associated to the **Personnel Type** for the contractor in the bottom panel.

"Click" on Personnel Type.

"Click" the **New** D button located on the toolbar.

"Select" the **Personnel Type** from the drop down list.

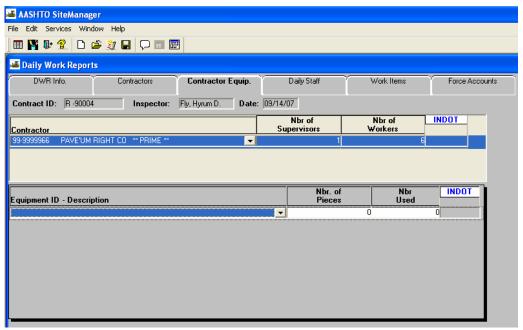
For each **Personnel Type**, "enter" the **Number of Persons**.

"Click" the **Save** button located on the tool bar.

Note: Only one contractor's information can be entered at a time.

To enter additional contractor's information "click on the **New** button located on the toolbar and move to the start of the "**Contractors**" section beginning with page 10 and repeat the steps listed.

Contractor Equipment Tab



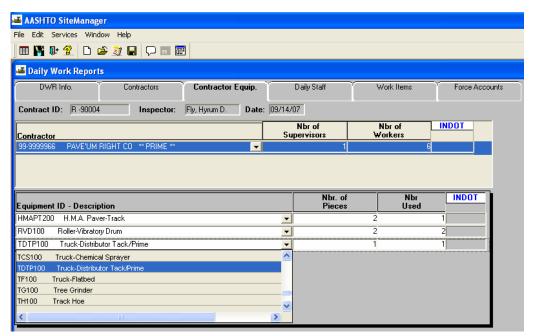
"Click" on Contractor Equip. tab.

Contractor's equipment must be associated to the appropriate Contractor for each day worked. Two panels appear for collecting information:

- **Contractor:** the **Contractor** tab is for selecting the identity of the contractor whose equipment use data is to be collected.
- **Equipment ID Description:** the Equipment ID Description panel is used to identify the equipment used by the selected contractor on the DWR date.

"Click" on the appropriate **Contractor** in the top panel.

If no contractor is populated in the top panel "click" on the dropdown arrow and "click" on the appropriate **Contractor**



The appropriate pieces of equipment and the appropriate number of pieces of equipment on-site will be selected from the bottom panel.

NOTE: Force Account information is not recorded here.

"Click" the **Save** button located on the toolbar.

Daily Staff Tab

INDOT will not use the Daily Staff portion of the DWR.

[&]quot;Click" on **Equipment ID-Description** field.

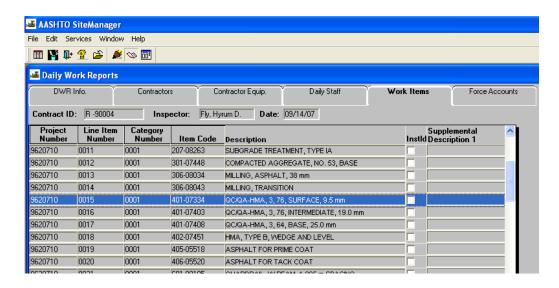
[&]quot;Click" the **New** D button located on the toolbar.

[&]quot;Click" on the appropriate **Equipment ID-Description** from the drop down list.

[&]quot;Enter" the appropriate number of pieces of equipment related to the description on-site in the **Nbr. of Pieces** column.

[&]quot;Enter" the appropriate number of pieces used in the Nbr Used column.

Work Items Tab



"Click" on Work Items tab.

The **DWR Record Work Items List** appears containing columns for:

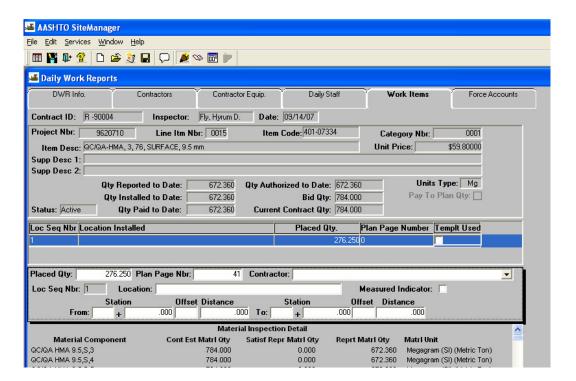
- **Project Number: Project Number** is the identification of the project which contains the work item.
- Line Item Number: Line Item Number is the bid proposal line number for the work item
- Category Number: the default setting of 0001 will be used.
- Item Code: Item Code is the INDOT defined code describing the work item.
- **Description:** Description is the title or description of the work item.
- Instld: Instld is an indicator that the work item has been installed.
- **Supplemental Description 1: Supplemental Description 1** is used to provide additional information for the work item.
- Supplemental Description 2: Supplemental Description 2 is used to provide additional information for the work item.

Scroll down to find appropriate work item.

"Click" to highlight appropriate item.

"Click" on **Record Work Item** button located on the toolbar.

NOTE: Verify the item number corresponds with the correct Project Number.



The **Record Work Items** window opens containing two panels.

The upper panel contains details of the work item plus a summary of previously reported quantities for the work item.

The bottom panel collects work performed information for the DWR

"Click" the **New** D button.

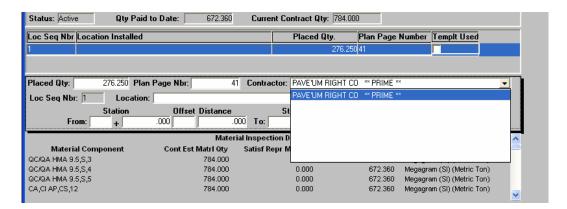
The following fields open for data entry;

• **Placed Quantity: Placed Quantity** is the quantity for pay associated to the item for that day's work. "Enter" the **Placed Quantity**.

NOTE: If a **DWR Template** is available, this field will be grayed out. Data will be populated after the template is saved.

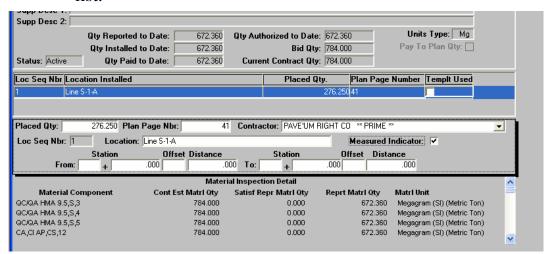
• Plan Page Nbr: Plan Page Nbr is the page number from the contract documents to be referenced.

"Enter" the plan page number, if appropriate.



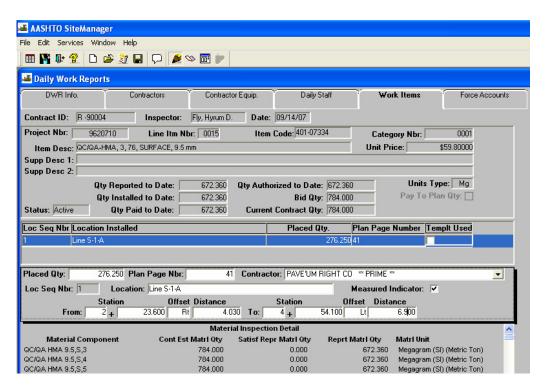
- **Contractor: Contractor** is a list of the Prime contractor and Sub-contractors associated to that item.
 - "Click" on the appropriate **Contractor** from the drop-down list.

NOTE: The sub-contractor must be associated to the line item and approved on the current date or a prior date before it is available in the **Contractor** drop-down list.



- Loc Seq Nbr: Location Sequence Number is the sequence number for the installation record for the item. This is an automated function.
- Location: Location is a brief description of the location where the work item was installed.
- **Measured Indicator**: Measured Indicator identifies that the installation of this work item was field measured.

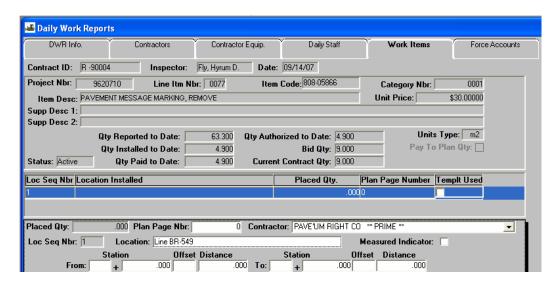
[&]quot;Click" on the Measured Indicator check box, if appropriate.



• Station Offset Distance: Station Offset Distance is the station and offset from the location associated to the work being installed.

"Enter" the beginning and ending stations with offsets, if appropriate.

NOTE: If you enter stationing, you **must** enter offsets in order to save information.



Some Work Items will have "Templates" associated with them which can be used to record measurements and ease computation of quantities.

After selecting the "Work Items Tab" and "Clicking" on the New button, the DWR Template Button will appear on the toolbar if Templates are associated to this work item. Enter the Data in the lower panel for Contractor and Location.

"Click" on the **DWR Template** button on the toolbar.

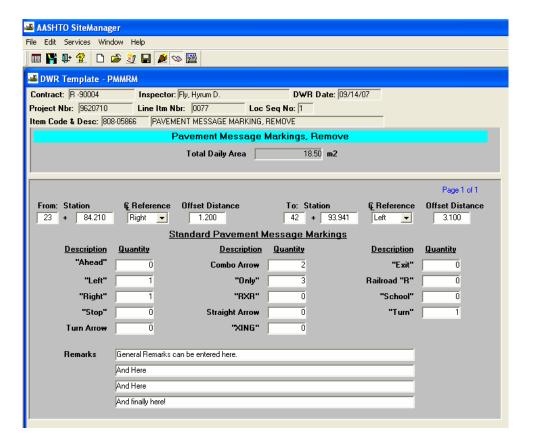


The **Select Template** window opens.

Scroll through the list until the appropriate template is identified.

"Click" on the template desired to highlight it.

"Click on Record Template Data to begin entering field measurement data.

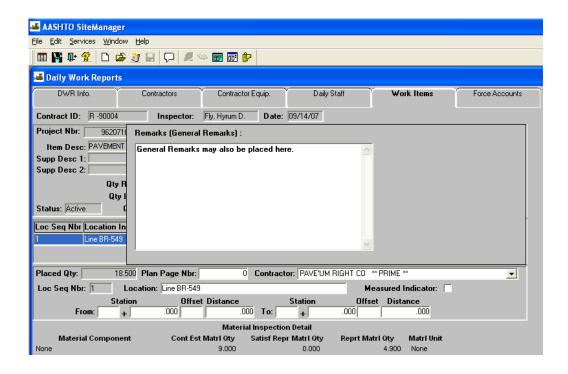


Enter the data indicated.

"Click" the Save 🖬 button located on the tool bar to complete computations.

"Click" the **New** D button to open additional sheets for additional areas.

"Click" the Close button to return to the Work Items Tab.



Remarks: Remarks balloon located on the tool bar is to be used for General Remarks.

"Click" on the **Remarks** \square button.

"Enter" remarks in the **Remarks** balloon, if applicable.

"Click" on **Remarks** \square button again to close Remark window.

Notice that once the remarks balloon had been populated the remarks icon appear with lines.

"Click" **Save** button located on the toolbar.

Force Accounts Tab

INDOT will not use the Force Accounts portion of the DWR.

Creating a Daily Work Report (DWR)

Exercise B-1-1-T Group Exercise

In the following exercise, you will create a DWR from information obtained by d90hfly, Hyrum D. Fly while inspecting PAVE'UM RIGHT Co.

Log into SiteManager as <u>update</u> Password: pass

Navigate from Main Panel:

"Double-Click" on Daily Work Reports (+) icon

"Double-Click" on Daily Work Reports icon

"Click" on Services located on the toolbar

"Click" on Choose Keys from the dropdown list

"Double-Click" on the appropriate Contract ID "R-90004"

DWR Info Tab

"Double-Click" on DWR Date field

Enter in yesterday's date

"Click" on OK

Enter **Temperature High:** 60 Enter **Temperature Low:** 35

Enter Weather Conditions A.M.: "Click" on Clear

Enter Weather Conditions P.M.: "Click" on Partly Cloudy

"Click" on **General Remarks** in the scroll down menu to the left of the **Remarks** field.

"Click" on Remarks field enter: "Worked on both sides of Casey Road intersection"

"Click" on Save

Contractors Tab

"Click" on Contractors field

"Click" on New button on the toolbar

"Click" on PAVE'UM RIGHT CO from drop down menu

"Click" on Supervisor/Foreman Name field

"Click" on New button on the toolbar

"Click" on Foreman from drop down menu

"Click" on **Personnel Type**

"Click" on New button on the toolbar

"Click" on Laborer on the drop down menu

Enter **Nbr of Persons:** 2

"Click" on Save on the toolbar

Contractor Equip. Tab

"Click" on PAVE'UM RIGHT CO in top panel

"Click" on Equipment ID-Description field

"Click" on New button on the toolbar

Select PMC100 Pavement Marking Cart from drop down list

Enter **Nbr. Of Pieces**: 1 Enter **Nbr Used**: 1 Enter **Hours Used**: 6

"Click" on Save on the Toolbar

Work Items Tab

"Click" on Line Item Number: 0077 "Pavement Message Marking, Remove"

"Click" on Record Work Item on the Toolbar

"Click" on New on the Toolbar

Enter Plan Page Nbr: 22

"Click" on Contractor: PAVE'UM RIGHT CO from drop down menu

Enter Location: Line S-4-A "Click" on Save on the Toolbar "Click" on Template ID: PMMRM

"Click" on Record Template Data located on the Toolbar

Station Location Information:

Enter **From**: 41 Enter +: 32.00 Enter **Offset**: RT Enter **Distance**: 15.25

Enter **To**: 47 Enter +: 25 Enter **Offset**: LT Enter **Distance**: 16.00

Enter in Turn Arrow: "Quantity 2"

Enter in ONLY: "Quantity 1"

"Click" on Save on the Toolbar

"Click" on Close on the Toolbar to close the Template Window

"Click" on Close on the Toolbar to close the Daily Work Report Window